

- d. creating a management record pointer instance and executing functions and filter associated with the management record pointer instance, if the primary record type is a lead primary record;
- e. if the primary record type is not a lead primary record, reading the management record pointer instance for the management record pointer family;
- f. determining whether a field related to the primary record instance is a management record pointer instance; and
- g. adding a primary record instance pointer to the management record pointer instance.

32. The method of claim 29, wherein the step of executing the management record functions comprises the steps of:

- a. retrieving the changed primary record instance and its corresponding primary record type;
- b. retrieving the function that uses the changed primary record instance;
- c. retrieving the management record pointer family of the function that uses the changed primary record instance;
- d. retrieving the management record pointer instance for the changed primary record instance;
- e. executing the function; and
- f. executing functions using the management record pointer instance.

33. The method of claim 29, wherein the substep of updating the dynamic documents comprises the steps of:

- a. identifying changed management record pointer instances and changed primary record instances;
- b. identifying the dynamic document pointers instances that use the changed fields;

- c. determining whether any of the changed fields, pointers and filters are used in other nested calculations, and identifying the dynamic document pointer instances that use the other nested calculations;
- d. executing the filters for the identified dynamic document pointers, each filter execution corresponding to a data selection according to a set of data selection criteria;
- e. executing the functions for the identified dynamic document pointers;
- f. re-sorting the records of dynamic document pointers; and
- g. re-displaying the records of dynamic document pointers.

34. The method of claim 2, wherein the step of writing an XML document for the dynamic document instance when any of its dynamic document pointer records change:

- a. identifying the changed primary record instances;
- b. identifying the dynamic documents pointer records that include changed primary record instances;
- c. updating the the dynamic documents pointer records affected by the primary record instance changes;
- d. retrieving the dynamic document definition to XML document type definition maps;
- e. creating the XML document by copying dynamic document instance data values into the record components;
- f. copying standard XML document header information and tags into the XML document; and
- g. handing the XML document and the destination Internet address to a web server.

35. The method of claim 1, wherein multiple individuals can view and maintain the identical MRI through multiple dynamic documents concurrently.